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JANUARY 5, 1987

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

NEW PRICING STRATEGY TAKING HOLD AMONG TOP MSO'S

NCTA CALLS FOR CAUTION ON CHANNEL REPOSITIONING

FNN CELEBRATES FIFTH YEAR WITH STRONG SHOWING

HIGHLIGHTS OF '86: A RETROSPECTIVE

WALL ST. REPORT CITES CABLE STRENGTH

**INDUSTRY LEADERSHIP FORUM:
THE DAWNING OF A NEW ERA**



CableVision

FRONTLINE

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As the deregulation era dawns, several MSOs are planning radical departures from past pricing/packaging strategies that could revolutionize the marketing of cable.

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NCTA moves on image 18

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Financial News Network hits stride after a rocky beginning.

FORUM

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Ten of the industry's top operators and programmers discuss the quality of cable programming, the merits of operator plans to support programming and the best approaches to pricing and packaging in this first part of a two-part compendium of interviews.

Highlights of 1986 31

The year just passed spawned a variety of major developments that, in the aggregate, set the stage for a new era in cable markedly different from the past.

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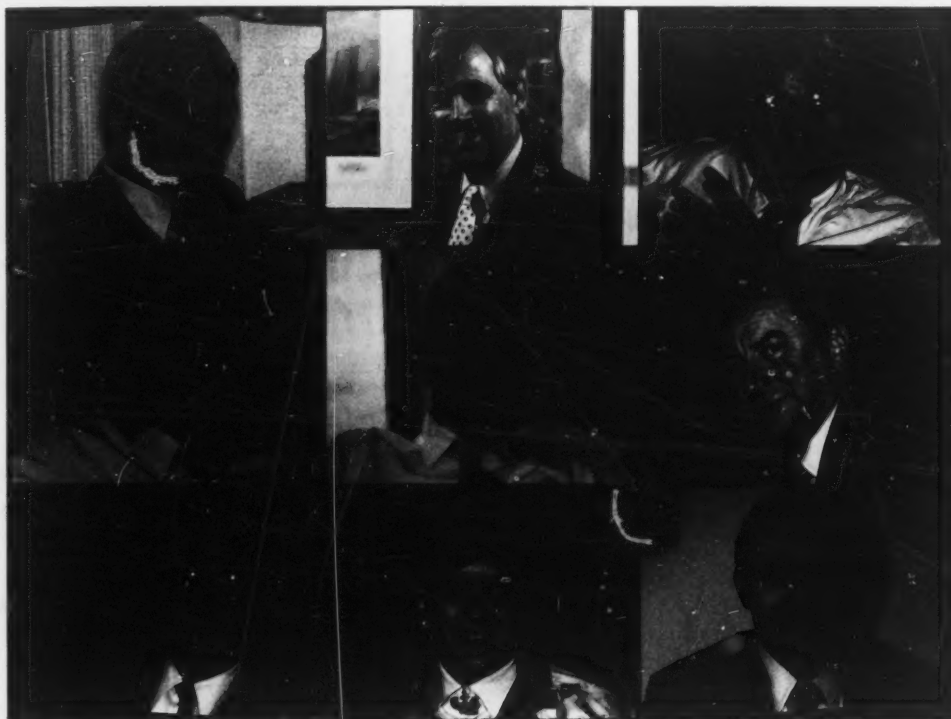
LAW AND REGULATION

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Serious concern about the overbuild threat from telcos and power companies was voiced in a Western Show panel on the subject, but, so far, activity remains limited.

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ON THE COVER

Participants in the Leadership Forum include 10 executives, one of whom, Charles Dolan, chairman of Cablevision Systems Development, is not shown. The others are, from top left to right, by rows: Ted Turner, chairman, Turner Broadcasting System; Bud Hostetter, chairman, Continental Cable; Michael Fuchs, chairman and CEO, HBO; John Malone, president, TCI; Terry Elkes, president and CEO, Viacom International; Bill Bresnan, chief executive, Bresnan Communications; John Cooke, president, The Disney Channel; Kay Koplovitz, president and CEO, USA Network; and Gus Hauser, chairman and CEO, Hauser Communications.

PROGRAMMING

Pay Per View Supply Chart

A listing of movies and events entering PPV distribution over the next two months.

January

About Last Night (1/1)
MPAA Rating: R Running Time: 114 mins.
Cast: Rob Lowe, Demi Moore

Tri-Star

Adventures of the American Rabbit (1/21)
MPAA Rating: G Running Time: 82 mins.
Cast: Animated

Paramount

Big Trouble In Little China (1/1)
MPAA Rating: PG-13 Running Time: 99 mins.
Cast: Kurt Russell, Kim Cattrail

20th Century-Fox

Extremities (1/21)
MPAA Rating: R Running Time: 90 mins.
Cast: Farrah Fawcett, James Russo, Alfre Woodard

Paramount

Gobots: Battle of the Rock Wards (1/21)
MPAA Rating: G Running Time: 74 mins.
Cast: Animated

Paramount

Howard the Duck (1/22)
MPAA Rating: PG Running Time: 111 mins.
Cast: Lea Thompson, Jeffrey Jones

Universal

Indiana Jones and the Temple of Doom (1/1)
MPAA Rating: PG Running Time: 118 mins.
Cast: Harrison Ford, Kate Capshaw, Ke Huy Quan

Paramount

Karate Kid Part II (1/29)
MPAA Rating: PG Running Time: 109 mins.
Cast: Ralph Macchio, Pat Morita

Columbia

Miracles (1/11)
MPAA Rating: PG Running Time: 90 mins.
Cast: Tom Conti, Teri Garr, Christopher Lloyd

HBO Enterprises

Out of Bounds (1/1)
MPAA Rating: R Running Time: 93 mins.
Cast: Anthony Michael Hall

Columbia

Under the Cherry Moon (1/5)
MPAA Rating: PG-13 Running Time: 100 mins.
Cast: Prince

Warner Bros.

Water (1/21)
MPAA Rating: PG-13 Running Time: 89 mins.
Cast: Michael Caine, Brenda Vaccaro, Valerie Perrine

Paramount

February

Source

Armed and Dangerous (2/1)
MPAA Rating: PG-13 Running Time: 88 mins.
Cast: John Candy, Eugene Levy, Robert Loge

Columbia

Back to School (2/1)
MPAA Rating: PG-13 Running Time: 96 mins.
Cast: Rodney Dangerfield, Sally Kellerman, Burt Young

Orion

A Fine Mess (2/1)
MPAA Rating: PG-13 Running Time: 90 mins.
Cast: Ted Danson, Howie Mandel

Columbia

Friday the 13th: Part 6 (2/11)
MPAA Rating: R Running Time: 87 mins.
Cast: Thom Mathews, Jennifer Cooke, David Kagan

Paramount

Heartburn (2/11)
MPAA Rating: R Running Time: 108 mins.
Cast: Meryl Streep, Jack Nicholson

Paramount

Not Quite Paradise (2/26)
MPAA Rating: R Running Time: 114 mins.
Cast: Sam Robards, Joanna Pacula

HBO Enterprises

Psycho III (2/5)
MPAA Rating: R Running Time: 93 mins.
Cast: Anthony Perkins

Universal

Reform School Girls (2/26)
MPAA Rating: R Running Time: 88 mins.
Cast: Wendy Williams, Sybil Danning

HBO Enterprises

Running Scared (2/15)
MPAA Rating: R Running Time: 106 mins.
Cast: Billy Crystal, Gregory Hines

MGM/UA

Note: Running times are approximate.

Film information provided to International Thomson Communications Inc. by distributors.
NR indicates film not rated by MPAA.

Pay Per View Services Profile

Service:	Cable Video Store	Request Television	Telstar Channels	Viewer's Choice
Launch:	April 1, 1986	November 27, 1985	June 5, 1986	November 26, 1985
Delivery:	Satcom 4, transponder 16	Galaxy 1, transponder 12	Interrum Standalone, presently testing on Telstar 303	VC-1 Satcom 3R, transponder 5 VC-2 Galaxy 1, transponder 16
Encryption:	VideoCipher II	VideoCipher II	Presently testing G. I. Starloc IV	VideoCipher II
Programming:	All movies, 24 hours per day 50-60 titles per month.	Two to four major motion pictures per week, special events	Channels 1&2: two major motion pictures on a biweekly rotation. Channel 3: three major motion pictures per week, special events	One major motion pictures per week special events
Subscribers:	Field trial basis; currently serving 10 MSO's nationwide. (2,500 + Impulse addressable subscribers)	Available in systems serving 2 million subs (1.4 million addressable)	Available in systems serving 74,000 subs (11,500 addressable).	Available in systems serving 2 million subs (1.6 million addressable)

CABLE STATS

Cable Industry Growth Chart

YEAR	TVHH	Homes Passed	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990E	93,900,000	81,783,000	50,706,000	54	32,959,000	35
1989E	92,800,000	79,109,000	48,256,000	52	30,883,000	33
1988E	91,000,000	75,833,000	45,500,000	50	28,665,000	32
1987E	89,300,000	71,137,000	41,971,000	47	26,022,000	30
1986E	87,800,000	68,121,000	39,510,000	45	24,101,000	27
1985	86,304,000	64,571,000	36,120,000	42	21,672,000	25
1984	84,600,000	59,989,000	32,994,000	39	19,764,000	23
1983	83,500,000	53,641,000	30,300,000	36	17,877,000	21
1982	82,800,000	49,100,000	28,200,000	34	15,898,000	19
1981	80,700,000	44,000,000	22,596,000	28	11,804,000	15
1980	77,800,000	37,300,000	18,672,000	24	7,780,000	10
1979	76,300,000	32,700,000	16,023,000	21	5,341,000	7
1978	74,500,000	27,200,000	14,155,000	19	2,980,000	4
1977	73,300,000	24,894,000	13,194,000	18	1,466,000	2
1976	71,114,000	21,989,000	12,094,000	17	505,000	1
1975	69,600,000	19,900,000	11,136,000	16	N A	N A

Source: CableProFile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH

Cable barometer

Television households (TVHH)	86,304,000
Homes passed by cable (HP)	64,571,000
Percent of TVHH passed by cable	74.7%
Basic cable subs.	36,120,000
Percent of TVHH with basic cable	41.8%
Percent of HP with basic cable	56.0%
Pay cable subs.	21,672,000
Percent of TVHH with pay cable	25.1%
Percent of HP with pay cable	33.6%
Percent of basic subs with pay cable	60.0%

Satellite lineup

Satcom III-R (RCA Americom)

Transponder	
Arts & Entertainment	24
BET	20
Cable Radio Network	4
Cable Value Network	18
Cinemax (West)	23
ESPN (Blackout)	7
Eternal Word Television Network	12
Financial News Network	8
HBO (West)	13
HSN2	2, 16
HTN	16
Home Shopping Network	22
The Learning Channel	2
Lifetime	17
MTV	11
National Jewish Television	18
Nickelodeon	1
PTL	2
Reuter Monitor Service	18
Showtime (West)	10
Tempo Television	6
TV Decisions	24
Trinity Broadcasting Network	3
USA Network (West)	9
Video Hits One	15
Viewer's Choice	5
The Weather Channel	19

Satcom IV (RCA Americom) Transponder

Alternate View Network	10
American Movie Classics	10
Biznet	6
Bravo	2
Consumer Discount Network	20, 24
Hit Video USA	18
Home Sports Entertainment	11
Home Team Sports	22
Innovations In Living (HSN2)	1
Liberty Broadcasting Network	7
Madison Square Garden	6
New England Sports Network	13
Nickelodeon (West)	4
Nostalgia Channel	21
The Playboy Channel	24
Prime Ticket	20
Rock Christian Network	3
The Silent Network	23V
SportsVision	9
WPIX-New York	19

Westar III (Western Union) Transponder

CNN	5
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Westar IV (Western Union) Transponder

Atlantic City Horse Racing	6
Cable News Network (CNN)	16

Catholic Telecommunications Network of America	11
International Television Network	10D
Public Broadcasting Service	15, 17, 21, 23
Texas State Network	2
Word of Faith Satellite Network	6

Westar V (Western Union) Transponder

Fantasy Unrestricted Network (FUN)	24
FUN Weekend Pay-per-view	24
Pro-Am Sports System (PASS)	14
The University Network	2
Zephyr Weather Information Service	7D

Telstar 303 (AT&T) Transponder

American Extasy	19
Country Music Television (CMTV)	18
KTVT (Dallas)	22
SelectTV	13

Galaxy I (Hughes) Transponder

CBN Cable Network	11
Cinemax (East)	19
CNN	7
C-SPAN	13
The Discovery Channel	22
The Disney Channel (East)	4
(West)	24
EPG	3
ESPN	9
GalaVision	20
HBO (East)	23
Headline News	8
Keyfax National Teletext Magazine	18
Moody Broadcasting Network	3
The Movie Channel (East)	10
(West)	14
The Nashville Network	2
PTL	17
Request Television	12
Seeburg Adult Contemporary	3
Seeburg Contemporary Instrumental	3
Showtime (East)	5
SIN	6
USA Network (East, Central)	21
Viewer's Choice 2	16
WGN	3
WOR-TV	15
WTBS	18

Galaxy III Transponder

The Meadows Racing Network	17
Sky Merchant	11

Spacenet I (GTE) Transponder

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Note: A company name in parentheses following a service or network designates the transponder owner.

Source: International Thomson Communications Inc.

Top 100 MSOs

Rank	Multiple system operator	Basic subs
1	Tele-Communications Inc.	3,900,000 (12.85)
*2	American Television and Communications Corp.	3,200,000 (11.86)
3	Storer Cable Communications	1,537,000 (11.86)
4	Cox Cable Communications	1,352,534 (11.86)
5	Continental Cablevision	1,339,000 (10.86)
6	Warner Cable Communications Inc.	1,293,000 (11.86)
*7	Comcast	1,103,145 (9.86)
8	United Cable	1,027,802 (7.86)
9	Newhouse Broadcasting	1,002,340 (11.86)
10	Heritage Communications Inc.	957,650 (10.86)
11	Viacom Cablevision	940,000 (11.86)
12	Times Mirror Cable Television Inc.	836,077 (11.86)
13	Jones Interchange	796,000 (11.86)
14	UA Cablesystems Corp.	753,363 (11.86)
15	Sammons Communications Inc.	708,609 (12.85)
16	Cablevision Systems Corp.	619,500 (11.86)
17	Rogers Cablevision Inc.	555,589 (10.86)
18	Telecable Corp.	469,437 (11.86)
*19	Daniels & Associates	452,825 (9.86)
20	McCaw Communications	416,545 (10.86)
21	American Cablesystems Corp.	408,097 (10.86)
22	Cencom Cable	384,825 (10.86)
23	Cable Vision Industries	367,700 (8.86)
24	Century Communications Corp.	367,000 (8.86)
25	Post-Newsweek	365,366 (10.86)
26	Wometex Cable TV Inc.	355,870 (10.86)
27	Scripps-Howard	349,155 (10.86)
28	Falcon Cable	379,000 (12.86)
29	Adelphia Communications	346,707 (12.86)
30	TCA Group	294,702 (8.86)
31	Multimedia Cablevision	293,704 (12.86)
32	Prime Cable Corp.	272,843 (11.86)
33	Colony Communications Inc.	253,263 (11.86)
34	Maclean Hunter Cable TV Ltd.	242,593 (10.86)
35	Lenfest Group	216,805 (10.86)
36	Tele-Media	215,000 (7.86)
37	Rifkin & Associates	200,000 (10.86)
38	Service Electric Cable TV Inc.	195,000 (7.86)
39	TKR Cable Co.	184,595 (11.86)
40	TCI-Taft	180,330 (11.86)
41	Communications Service Inc.	179,000 (2.85)
42	Western Communications	178,543 (10.86)
43	Cableentertainment	173,145 (10.86)
44	Sutton Capital Corp.	166,561 (2.86)
45	Adams-Russell Communications	154,000 (9.86)
46	First Carolina Communications Inc.	153,477 (10.86)
47	Harte-Hanks Communications	146,813 (8.86)
48	Greater Media	146,409 (12.86)
49	Cencom Cable	142,863 (10.86)
50	Media General Inc.	136,200 (11.86)
51	Marcus Communications	133,711 (12.86)
52	Palmer Communications	132,765 (10.86)
53	Harron Communications	130,671 (9.86)
54	Telemedia Inc.	128,734 (11.86)
55	Harris Cable Corp.	125,820 (11.86)
56	Armstrong Utilities	121,509 (7.86)
57	Summit Communications	115,405 (11.86)
58	The Essex Group	112,418 (9.86)
59	Sonic Communications	110,000 (7.86)
60	Blade Communications	105,000 (7.86)
61	Scott Cable Communications	105,000 (3.86)
62	U.S. Cable Corp.	103,599 (10.86)
63	Booth Communications	102,825 (11.86)
64	Multi-Channel TV Cable Inc.	101,874 (4.86)
65	Simmons Communications	100,295 (10.86)
66	James Communications	95,000 (12.86)
67	King Videocable	94,327 (11.86)
68	Perry Cable TV Corp.	91,306 (8.86)
69	McDonald Group	90,079 (8.84)
70	Susquehanna Broadcasting	89,701 (10.86)
71	WEHCO Video	85,807 (10.86)
72	Norland Communications	85,250 (9.86)
73	Columbia International	80,000 (11.86)
74	Midcontinent Cable Systems Co.	79,821 (12.86)
75	Pencor Services	74,868 (8.86)
76	Omega Communications	74,213 (11.86)
77	Selkirk Communications	63,000 (11.86)
78	National Telecommunications Corp.	61,625 (1.86)
79	The Daily Press	60,100 (6.86)
80	Mountain Cable Co.	60,000 (10.86)
81	United Video Management	59,448 (10.86)
82	Action Corp.	56,337 (9.86)
83	Helicon Corp.	55,000 (11.86)
84	Masada Corp.	53,237 (7.86)
85	Cardinal Communications	52,419 (10.86)
86	Tidel Communications	50,284 (9.86)
87	Wisconsin Cablevision and Radio Co.	50,083 (7.86)
88	Chambers Cable Comm. Inc.	48,402 (8.86)
89	State Cable TV	47,933 (11.86)
90	Joseph Gans Cable TV	46,532 (11.86)
91	C4 Media Corp.	45,200 (9.86)
92	Dowden Communications	44,500 (10.86)
93	Bresnan Communications Co.	44,426 (8.86)
94	Enstar Communications	43,579 (11.86)
95	New England Cablevision	43,050 (9.86)
96	Donrey Cablevision	42,600 (11.86)
97	Commonwealth Cable Systems	40,987 (10.86)
98	North American Comm. Corp.	37,710 (6.86)
99	Heart Communications of California	37,016 (9.86)
100	Benchmark Communications Inc.	35,000 (9.86)

Subscriber counts are provided by MSOs and systems to International Thomson Communications Inc. Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to CableVision, Attention Cable Stats, P.O. Box 5208-TA, Denver, CO 80217. * Includes portion of Group W subscribers.

Top 100 systems

Rank	Location	Operator	Basic subs
1	San Diego, CA	Cox Cable	272,304 (11.86)
2	Woodbury (Long Island), NY	Cablevision Co.	252,400 (11.86)
3	Manhattan, NY	ATC	219,600 (12.85)
4	San Antonio, TX	Rogers	198,736 (11.86)
5	Houston, TX	Warner	189,900 (11.86)
6	East Orange, NJ	Maclean Hunter	184,841 (10.86)
7	Seattle/Snohomish, WA	Viacom	171,000 (11.86)
8	Honolulu, HI	ATC	164,300 (12.85)
9	Louisville/Jeff. Co., KY	Storer Communications	155,000 (11.86)
10	Hartford/New Britain, CT	United Cable	153,570 (7.86)
11	Cincinnati, OH	Warner	153,100 (11.86)
12	Phoenix, AZ	Times Mirror	152,214 (11.86)
13	Wayne, NJ	UA Cablesystems	149,685 (11.86)
14	Tulsa, OK	United Cable	140,333 (6.86)
15	Englewood, CO	United Cable	138,285 (8.86)
16	Tidewater (Norfolk), VA	Cox Cable	137,629 (8.86)
17	Cherry Hills, NJ	NYT	133,316 (5.86)
18	Buffalo, NY	Adelphia Communications	132,209 (12.86)
19	Atlanta, GA	Prime Cable Corp.	132,133 (11.86)
20	Jacksonville, FL	Continental	129,500 (10.86)
21	Florida Division (Orlando/Ormond Beach)	ATC	128,100 (12.85)
22	Seattle, WA	Group W (TCI)	127,000 (5.86)
23	Fairfax, VA	Media General	125,991 (11.86)
24	Rochester, NY	ATC	123,500 (12.85)
25	Baltimore County, MD	Comcast	122,730 (9.86)
26	Essex County, NY	Prime Cable Corp.	119,002 (11.85)
27	Manhattan, NY	Group W (ATC)	115,000 (5.86)
28	Kansas City, MO	ATC	114,600 (12.85)
29	St. Louis, MO	Cencom Cable	111,487 (10.86)
30	San Jose, CA	Gill Industries	110,000 (5.86)
31	Long Island, NY	Viacom	110,000 (11.86)
32	Austin, TX	ATC	109,700 (12.85)
33	Central Islip (Long Island), NY	Viacom	109,000 (9.86)
34	Memphis, TN	ATC	106,900 (12.85)
35	San Juan, PR	Harris Cable Corp.	104,823 (11.86)
36	Richmond/Ferris, VA	Continental	104,000 (10.86)
37	Toledo, OH	Blade Communications	103,982 (4.86)
38	Los Angeles, CA	Falcon	103,869 (4.86)
39	San Francisco, CA	Viacom	103,000 (11.86)
40	Warren, NJ	TKR	99,379 (11.86)
41	Jefferson Parish/Kenner, LA	Cox Cable	96,886 (11.86)
42	Southeast Michigan	Comcast	96,454 (9.86)
43	Pinellas County, FL	Vision Cable	93,556 (12.86)
44	Pompano, FL	American Cablesystems	93,108 (10.86)
45	Wilmington, DE	Heritage	93,000 (6.86)
46	San Diego, CA	ATC	92,200 (12.85)
47	Dallas, TX	Heritage	91,956 (10.85)
48	Grand Rapids, MI	UA Cablesystems	91,480 (11.86)
49	Dade/Broward, FL	Storer	87,573 (11.86)
50	Eacondo, CA	Times Mirror	85,678 (9.86)
51	Pittsburgh, PA	Tele-Communications Inc.	84,517 (6.86)
52	Jackson, Minn., MS	ATC	82,500 (12.85)
53	Wichita, KS	Multimedia Cablevision	82,172 (12.86)
54	Indianapolis, IN	Indianapolis Cablevision Inc.	80,969 (5.86)
55	South Texas, TX	Heritage	79,688 (10.86)
56	Charlotte, NC	ATC	78,700 (12.85)
57	Boston, MA	Cablevision	78,500 (11.86)
58	Flint, MI	Comcast Cable	78,349 (9.86)
59	Puget Sound, WA	Viacom	78,000 (9.86)
60	Raleigh, NC	ATC	77,600 (12.85)
61	Baton Rouge, LA	Cablevision	76,663 (9.86)
62	Tacoma, WA	Cable TV of Puget Sound	76,132 (5.86)
63	Chicago, IL	Group W	75,000 (4.86)
64	New Orleans, LA	Cox Cable	74,578 (11.86)
65	Greensboro, NC	ATC	74,100 (12.85)
66	San Jose, CA	Group W (Century)	74,000 (5.86)
67	Las Vegas, NV	Prime	72,293 (11.86)
68	Orange County, CA	Times Mirror	72,124 (9.86)
69	Nashville, TN	Viacom	72,000 (11.86)
70	South Bend, IN	Heritage	71,887 (10.86)
71	Cleveland Heights, OH	Viacom	71,000 (11.86)
72	Contra Costa Co., CA	Televents	70,865 (11.86)
73	Allentown, PA	Service Elec.	70,000 (7.86)
74	Akron, OH	Warner	69,055 (11.86)
75	Fayetteville, NC	ATC	69,000 (9.86)
76	New Haven, CT	Storer	69,541 (11.86)
77	Columbus, OH	Warner	68,900 (11.86)
78	Little Rock, AR	Storer	68,372 (11.86)
79	Omaha, NE	Cox Cable	67,613 (11.86)
80	Medford Complex (Boston Suburbs), MA	Warner	67,400 (11.86)
81	Ocean County, NJ	Adelphia	66,051 (6.86)
82	Westchester Co., NY	UA Cablesystems	65,506 (11.86)
83	Des Moines, IA	Heritage	65,430 (10.86)
84	St. Petersburg, FL	Group W (ATC)	64,478 (5.86)
85	Syracuse (suburban), NY	NewChannels Corp.	64,065 (9.86)
86	Indianapolis, IN	ATC	64,000 (12.85)
87	Greater Bridgeport, CT	Cablevision Co.	63,800 (11.86)
88	Monterey, CA	Western Communications	63,731 (10.86)
89	Sarasota, FL	Storer	63,236 (11.86)
90	Oklahoma City, OK	Cox Cable	63,075 (11.86)
91	Santa Barbara, CA	Cox Cable	62,456 (11.86)
92	Lower Fairfield Co., CT	Cablevision Co.	62,360 (11.86)
93	Winston-Salem, NC	Summit	62,238 (11.86)
94	Madison, WI	Tele-Communications Inc.	62,099 (5.86)
95	El Paso, TX	Group W (ATC)	62,000 (9.86)
96	Charleston, S.C.	Storer	61,626 (11.86)
97	Albany, GA	Storer	60,964 (11.86)
98	W. San Fernando Valley, CA	Valley Cable	60,866 (8.86)
99	Westchester, CT	UA Cablesystems	60,494 (10.86)
100	Knoxville, TN	Scripps Howard	60,000 (11.86)